

MRDDA Contract Administration

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| Policy and Procedure Number: CA108 | Title: Process to Issue Task Orders under HCAs |
| Effective Date: April 18, 2003 | Revision Number: 0.0 |
| Approvals: Bureau Chief of Contract Administration and Bureau Chief of Program Integrity | Page 1 of 1 |

1.0 Policy All properly submitted requisitions shall be converted into task orders within twenty-eight (28) business days from date of request.

2.0 Scope The scope of this document is to establish procedures for issuing task orders to be released under a Human Care Agreement (HCA). An HCA is a purchase agreement that gives the District of Columbia the option to buy goods and services covered by the agreement through issuing a proper task order to the provider. The HCA contains the types of services covered along with pricing for multiple years. The Task Order Issuance Process shall involve the Community Based Resource Specialists, the Services Management Specialists, the Bureau Chief of Contract Administration, the Budget Office, and the Office of Contracts and Procurement (OCP).

Definitions

The “3-in-1” form is the authorized funding document that is converted into a task order and allocated through the appropriate HCA upon the Budget Office certification that funds are available in the estimated amount contained in the requisition.

3.0 Procedures The process is cross-functional in nature and involves all the applicable parties.

- 3.1 When there is a need to establish a particular scope of services for a specific consumer, to add a new consumer, or adjust the contract pricing with a provider under a signed HCA, the Community Based Resource Specialist shall write a justification and request that a task order or change order be issued under the contract. A budgetary estimate using the rates in the contract shall also be provided by the Community Based Resource Specialist. This justification and request shall be sent to the Services Management Specialist within two (2) business days.
- 3.2 Upon receipt of the justification, the Services Management Specialist shall review the scope of services and changes requested in light of the justification provided. The Community Based Resource Specialist and the Services Management Specialist shall agree on the specifics of the task order before proceeding to the approval phase. The Services Management Specialist shall create the “3-in-1” form and forward it to the Bureau Chief

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| Approvals: Bureau Chief of Contract Administration and Bureau Chief of Program Integrity | Page 2 of 2 |

of Contract Administration for approval. This task shall be performed within five (5) business days of receipt of the justification,

- 3.3 Once received, the Bureau Chief of Contract Administration shall approve or reject the request based on his/her assessment of task order conformity to the Human Care Agreement. This task shall be performed within two (2) business days. If approved, within two (2) business days, the Services Management Specialist shall send the 3-in-1 form along with supporting documentation to the Budget Office for the pre-encumbrance of funds. Supporting documentation includes the scope of services, specific information on the task order desired, justification for award, reference to the appropriate contract section, and the 3-in-1 form approvals. If rejected, the Bureau Chief of Contract Administration shall transmit the request to the Services Management Specialist to address concerns.
- 3.4 Within three (3) business days of receipt of the 3-in-1 form and supporting documentation, the Budget Office shall pre-encumber the funds and send the completed 3-in-1 form along with the supporting documents cited in section 3.3 to the OCP.
- 3.5 The OCP shall verify funding and rates on the task order document and return the 3-in-1 with the supporting documentation cited in section 3.3 to the Budget Office for full encumbrance. This task shall be performed within three (3) business days.
- 3.6 The Budget Office shall review the 3-in-1 and supporting documentation, fully encumber the funds and submit the fully encumbered 3-in-1 with the supporting documentation to the OCP within two (2) business days.
- 3.7 The OCP shall send the task order to the provider for review and signature within three (3) business days.
- 3.8 The provider shall review and sign the task order and return the contract documents to the OCP within three (3) business days.
- 3.9 The OCP shall sign the task order and distribute the contract documents to Accounts Payable, Services Management Specialist and the provider within two (2) business days.
- 3.10 The Services Management Specialist shall forward the contract documents to the Community Based Resource Specialist within one (1) business day.

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4.0 Process Flow

The attached flow chart indicates the above steps, roles and responsibilities of the parties, and the number of days allocated to each step in the process.

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